Five Factors Distinguish Best-in-Class Consultants from Average Practitioners

2019 Greenwich Leaders: U.S. Investment Consulting

April 28, 2020

Executive Summary:



Greenwich Associates identified five factors that distinguish best-in-class consultants from average practitioners.

Methodology:

Between July and October 2019, Greenwich Associates conducted interviews with 1,100 individuals from 896 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate and union funds, public funds, and endowment and foundation funds with either pension or investment pool assets greater than $150 million.

Study participants were asked to provide quantitative and qualitative evaluations of their asset management and investment consulting providers, including qualitative assessments of those firms soliciting their business and detailed information on important market trends.

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